



USDA FEDERAL EMPLOYEE TRANSIT BENEFIT PROGRAM

**Approving Official
Guide for Supervisors and
Transit Benefit Coordinators
(TBC)**

Oversight Guidelines for Supervisors and Transit Benefit Coordinators (TBC)

Background

The U. S. Department of Agriculture (USDA)'s agencies/offices are responsible for verifying federal employees meet the requirements for participation in the transit benefit program as outlined in Executive Order 13150 *Federal Workforce Transportation*, April 21, 2000, and [DR 4080-811-4](#). This includes determining that employees are using mass transit for the bulk of their commute to work.

The U. S. Department of Agriculture (USDA) Transit Benefit Program Policy and Guidance requires USDA agencies / offices to establish Transit Benefit Coordinators (TBC) for the National Capital Region and field offices.

- Transit Benefit Coordinators (TBC) are responsible to communicate, coordinate, audit, and manage their agency transit benefit programs – See Coordinator's Listing for your POC.
- TRANServe provides guidance and serves as the point of contact for Transit Benefit Program Administration.

Best Practices

To maintain integrity and program controls, Transit Benefit Coordinators and Parking Office must conduct routine audits of transit benefit records.

Internal Controls include:

- A. Review monthly transit benefit billing reports for accuracy. The review should verify:
 1. Employees who have departed the agency are no longer receiving benefit. Cross check the transit benefit alphabetical listing with Human Resources records to ensure separated employees followed exit procedures and withdrew from the transit benefit program.
 2. Employees on extended travel or leave have not picked up a monthly benefit for the period they were not at their primary duty station.
 3. Employees who intermittently telework or drive should show as a reduced amount on the 6 month report
 4. Benefits are adjusted due to change of address
 5. Participants with a pickup record over the monthly statutory limit are reported to the agencies/offices/program office.
 6. Participants must notified in writing of the policy requirements, when records show no adjustments were made due to parking.
- B. Verify transit benefit applications disclose/provide all information required by the OMB Memorandum, M-07-15 such as:
 - Expense Worksheet
 - The Employee's Home Address (including the street name)
 - The Employee's Work Address (including the street name)
- C. Enforce the use of electronic fare media where available

Visit the TRANServe website at: <http://transerve.dot.gov>

Monitoring Guidelines

- Check the six month report for adjustments
 - Participants are expected to adjust when they do not use mass transit
 - i.e. leave, travel, unscheduled telework, weather closure, driving, carpooling, or slugging
- When there are no adjustments:
 - Talk to the participant...what is his/her work schedule?
 - Check the method of transportation ... i.e. a monthly pass user would not have an adjustment
- When you believe adjustments should be made:
 - Check the participant's leave history
 - Check the participant's travel schedule
 - Request the participant's pickup records from TRANServe
 - Request proof of no parking from the USDA Parking Facility

Important Note:

USDA recommends all Transit Benefit Program Participants recertify their transit benefit and complete Transit Benefit Integrity Awareness training annually utilizing the honor system.

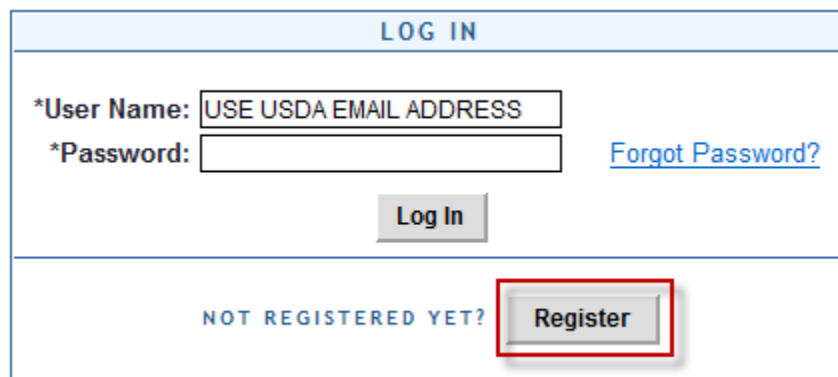
Visit the TRANServe website at: <http://transerve.dot.gov>

Start at the [TRANServe.dot.gov](https://transerve.dot.gov)

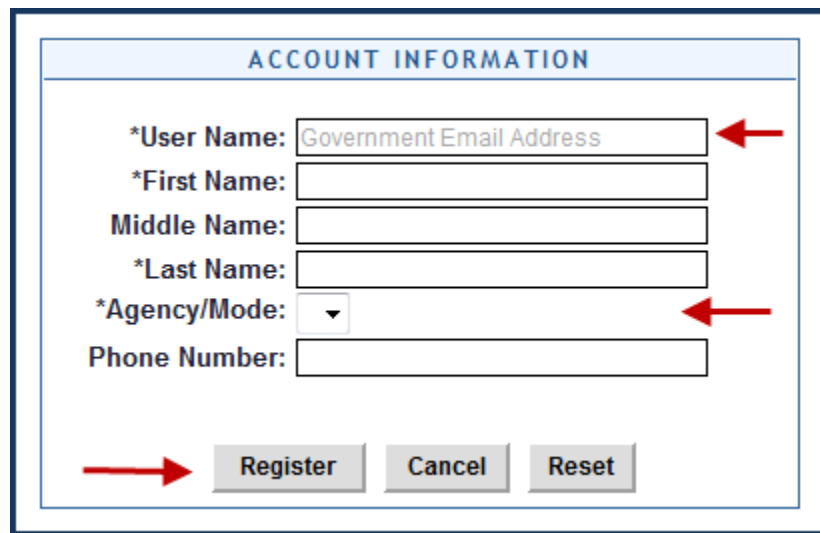
- Choose **Participants** :

| | | | | | | |
|------|------------|----------------------------------|-----------|--------------|------------|--------|
| HOME | DEBIT CARD | RETURN OF EXCESS TRANSIT BENEFIT | RESOURCES | PARTICIPANTS | CONTACT US | F.A.Q. |
|------|------------|----------------------------------|-----------|--------------|------------|--------|

- Click: [Transit Benefit Program Application System](#)
 - ◆ Or type <https://transitapp.ost.dot.gov> into your browser
- Log-in with your User Name and Password
 - ◆ Your government email address is your User Name
 - ◆ **FIRST TIME IN THE SYSTEM** – Click “Register” to create an account”



- Complete the Account Information form (see screenshot below)
 - ◆ Use Your government email address is your User Name
 - ◆ Then tab to “Agency/Mode” to auto-fill “USDA”



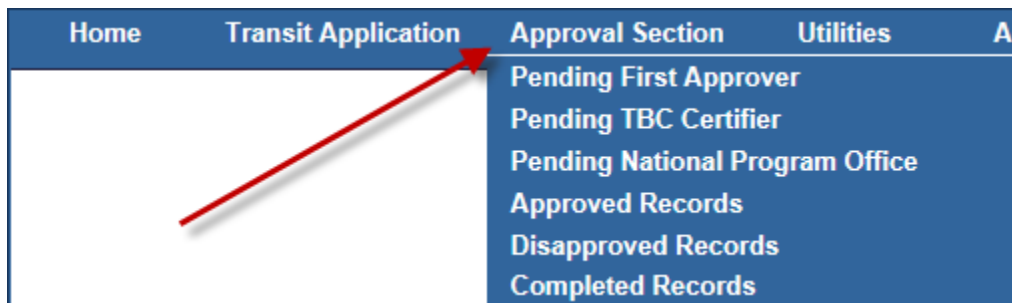
When they complete registration all Supervisors must email transitsubsidyprogram@dm.usda.gov to request elevation to Approver Status

Application Types:

- 1) RECERTIFY/ENROLL
 - a. Recertification = existing participants
 - b. New enrollees
- 2) CHANGE
 - a. Information Change
 - i. address, rate, method of transportation
- 3) WITHDRAWAL
 - a. Withdraw from the program

Application Review:

- 1) Hover over “Approval Section”



- 2) Select the correct queue:
 - a. 1st Approver – Select “Pending First Approver” (This is the Supervisor)
 - b. 2nd Approver – Select “Pending TBC Certifier” (This is the Transit Benefit Coordinator)

3) Click a name to review an item in your queue (Use "Ctrl. + F" to find a name more quickly)

| Home | Transit Application | Approval Section | Utilities | Admin | Logout | Welcome | |
|--|---------------------|------------------|--------------------------------------|----------------------------|-----------------------------------|---|--|
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | New Transit Benefit Participant | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| USDA | FS11 | 07/20/2015 | Annual Certification/Recertification | Click Name | <input type="checkbox"/> Approved | <input type="checkbox"/> Disapproved Reason: <input type="text"/> | |
| <div>Process Reset</div> | | | | | | | |

a. The application and expense worksheet are displayed.

U.S. Department of Transportation

TRANSERVE
Business in motion

Facilities Service Center - TRANServe

U.S. Department of Transportation

TRANSERVE

Transit Benefits Program

Home Transit Application Approval Section Utilities Admin Logout

Welcome CHERI JOHNSON

ApproveDisapproveCancel

Reason for Disapproval:

[\[History\]](#)

TRANSIT BENEFITS WORKSHEET

Reason for Certification:
New Transit Benefit Participant

Civilian/Military: Civilian Work Status: Full Time

| Method of Transportation | | Daily Expense | Days per Month | Total Monthly Expense |
|--|--------------------------|---------------|----------------|------------------------------|
| Bus to Work | Name of Company | \$ | | \$ |
| Bus from Work | Name of Company | \$ | | \$ |
| Other Bus to Work | Name of Company | \$ | | \$ |
| Other Bus from Work | Name of Company | \$ | | \$ |
| Rail to Work | Name of Company METRO | \$ 2.25 | 18.00 | \$ 40.50 |
| Rail from Work | Name of Company METRO | \$ 2.25 | 18.00 | \$ 40.50 |
| Other Method to Work: | Name of Company | \$ | | \$ |
| Other Method from Work: | Name of Company | \$ | | \$ |
| Van Pool | Name of Company | \$ | | \$ |
| Subtotal: | | | | \$ 81.00 |
| Employees are responsible for adjusting their monthly transit benefits each month in accordance with their actual work commute each month. | | | | Total Monthly Costs \$ 81.00 |

TRANSIT BENEFITS APPLICATION

STATUS: [RECEIPTIFY]

Smart Benefits Program: YES

Identifier: ****

Name:
(Last) (First) (Middle Name)

Email Address: Work Phone:

Common Identifier: Work Zip Code: 20814

Mode: Region: DC-PHILADELPHIA

Admin:

I certify that my usual monthly commuting cost are: \$81.00

WORK INFORMATION

Work Address:

Work City: Bethesda Work State: MD Work Zip: 20814

RESIDENCE INFORMATION

Address:

City: Washington State: DC Zip: 20008

Approving Official:

Point of Contact: CHERI JOHNSON

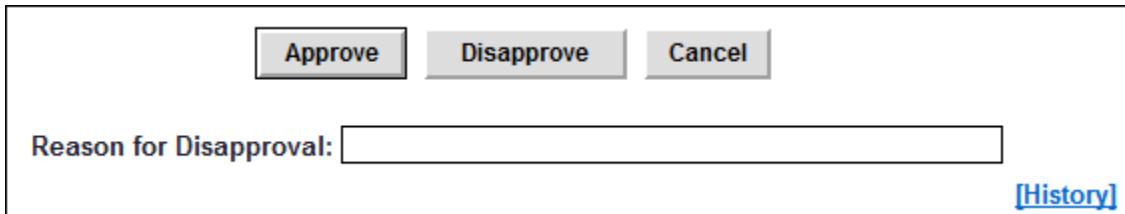
Manager/Fund Certifier: Phone:

SmartTrip Card Number:

Comment for Agency Approvers:

4) Review the Application

- a. The Application must:
 - i. Specify name of Transportation Provider
 - ii. Indicate Daily, Weekly, Subtotal, Total Monthly Expense
- b. The Approver must:
 - i. Verify the employee works for your Agency
 - 1. Check with your HR department, if needed
 - 2. Check the global directory
 - ii. Check SmarTrip® user entered number correctly
 - 1. Regional Field Offices enter “NA”
 - iii. Approve or Disapprove the Application
 - 1. Scroll to the top
 - a. Click “Approve” or “Disapprove”



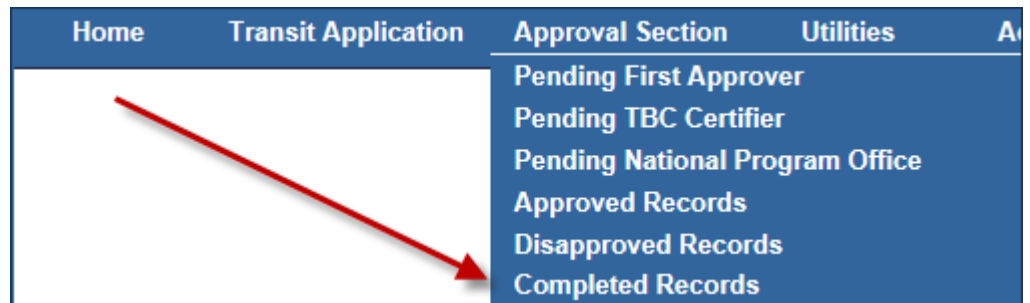
The screenshot shows a rectangular box containing three buttons at the top: 'Approve', 'Disapprove', and 'Cancel'. Below these buttons is a label 'Reason for Disapproval:' followed by a text input field. In the bottom right corner of the box is a blue link labeled '[History]'.

- iv. If disapproved, enter Instructions to Participant in “Reason for Disapproval”

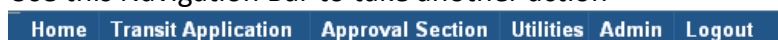
Note: Click “[History]” to review past actions

5) To View Past Applications

- a. Select “Completed Records”



- b. Enter the Participant’s Name
- c. Click “Search”
 - i. Click a Participant Name to choose a record
 - 1. Review past application (if applicable)
 - 2. Click “Back” to look at another past application
 - 3. Use this Navigation Bar to take another action



Appendix A

Using The Proxy Feature

Special Instructions for Supervisors who delegate a Proxy that is NOT technically a Supervisor

- 1) To delegate approval authority to someone who technically is not a supervisor (not listed in the National Finance Center as a Supervisor) the Supervisor must submit a delegation of authority memorandum for the record. (See Appendix C). *When complete, email the memo to transitsubsidyprogram@dm.usda.gov.*
- 2) Once the Program Office confirms the NFC Supervisory coding (internal control) it is authorized to elevate the delegated role to the person assigned on the memo. Then the actual Supervisor can assign their delegate as Proxy in the eApp system.
- 3) When the applicants select their Supervisor, they will select the authorized NFC Supervisor and the Proxy will receive notification to approve the application on the supervisor's behalf. **The actual Supervisor is still the responsible party.** The proxy can perform the approval functions in the eApp System.

How to add a Proxy in the eApp:

- 1) From the Home screen, click "My Account"
- 2) Click on your role
- 3) "Supervisor Proxy" or "Manager Proxy"

The screenshot shows the 'SUPERVISOR PROXY' interface. It features two main columns: '(not selected)' on the left and '(selected)' on the right. The '(not selected)' column contains a list of blue horizontal bars representing potential proxy users. Below this list is a red-outlined button labeled 'Add >>'. The '(selected)' column is currently empty and has a button labeled '<< Remove' below it. At the bottom of the interface, there is a light blue box stating 'Users who have you as proxy: N/A'. Below this box is a hint: 'A hint is a meaningful personal association to help you remember your password. This is optional, but highly recommended.' At the very bottom are three buttons: 'Update', 'Cancel', and 'Reset'.

1. Select your designated Proxy from (not selected) list on the left
2. Click "Add" to move name to (selected) box.
3. Click "Update"

Reverse these steps
to Remove a Proxy:

- 1. Click “Remove” to return name to the (not selected) box.
- 2. Click “Update”

SUPERVISOR PROXY

(not selected)

Add >>

(selected)

<< Remove

Appendix B

Sample: Delegation of Authority Memorandum for the Record

Employee completes the MFR on their own letterhead, sign it, and submit it to the Elevation party (see **Registration Instructions** section of this Guide).



United States
Department of
Agriculture

Forest
Service

Washington
Office

1400 Independence Avenue, SW
Washington, DC 20250

File Code:

Date:

TO: Transit Subsidy Benefit Program Office

FROM: John Smith
Director
Animal and Plant Health Inspection Service

SUBJECT: Delegation of Non-Supervisory Government Employee to Supervisory
Approval Level in Transit eApp

Request the non-supervisory employee listed below be elevated to the "Supervisory" approval level in the Transit Benefit Electronic Application (eApp) system in order to later be identified as my Proxy.

- Jane Doe (Registration Email: Jane.Doe@aphis.usda.gov)

If you have any questions, please feel free to contact me at (202) 720-0000 or via email at John.Smith@aphis.usda.gov.

☒ Sincerely,

□

Appendix C

Sample: Delegation of Authority Memorandum for the Record

Employee completes the MFR on their own letterhead, sign it, and submit it to the Elevation party (see **Registration Instructions** section of this Guide).

I



United States Department of Agriculture

Departmental
Management

Office of the
Assistant Secretary
for Administration

Office of Human
Resources
Management

1400 Independence
Avenue, SW
Washington, DC
20250

April 8, 2013

TO: Transit Subsidy Benefit Program Office

FROM: John Smith
Director
Animal and Plant Health Inspection Service

SUBJECT: Delegation of Non-Supervisory Government Employee to Supervisory
Approval Level in Transit eApp

Request the non-supervisory employee listed below be elevated to the "Supervisory" approval level in the Transit Benefit Electronic Application (eApp) system in order to later be identified as my Proxy.

- Jane Doe (Registration Email: Jane.Doe@aphis.usda.gov)

If you have any questions, please feel free to contact me at (202) 720-0000 or via email at John.Smith@aphis.usda.gov.

Most Frequently Asked Questions

Please note, there are special instructions for Employees without USDA E-mail address

Q. 1

How does an Employee with no USDA email address register in the Electronic Transit Benefit Application System?

A.1

An Employee without a USDA email address must complete Transit Form AD-1147 and submit the form to their TBC. The TBC then submits a spreadsheet to DOT/TRANServe.

Q.2

Why am I not getting emails to approve transit benefit applications?

A.2

Check your Junk Folders. Your email account may be identifying notifications as SPAM. Check your Junk folders for an email from "PTB Public Website Administrator". The subject will be something like: "1 Transit Benefit Application(s) is awaiting approval".....Keep checking your email or your Approval Queues or correct the Junk Folder rule.

To correct the " Junk E-mail" folder:

- 1) Right click on the emails from "PTB Public Website Administrator"
- 2) Hover over the "Junk" option and select "Never Block Sender"
 - a. Optional: Right click on one "PTB Public Website Administrator" email (still in the Junk E-mail folder)
 - b. Hover over "Move"
 - c. Select "Always Move Messages in this Conversation"
 - d. Select your Inbox (this will move them)

Q.3

Why can't I find "Nathan O'Donnell?"

A.3

Any name normally containing an apostrophe must be spelled out without it. For example: Nathan ODonnell.

Q. 4 Why can't I complete Registration? I am getting an error to enter "Agency/Mode. It is not popping up

A. 4 Check the Username entry. You must enter your USDA email address in the Username field.

For more F.A.Q.s check <http://transerve.dot.gov/faq.html>

Click here to view a Pre-recorded Training WEBINAR:

[USDA Approving Official Training – recorded session](#)

Or Visit the USDA section of the TRANServe website at: <http://transerve.dot.gov>

Your Transit Benefit Coordinator (TBC) / Manager

are available to assist you

if this guide and the pre-recorded webinar

do not answer all your questions.

Please e-mail questions to:

transitsubsidyprogram@dm.usda.gov

